MSIX Training Environment Guide

MSIX Training Environment Guide

Version 1.0

April 2008

Table of Contents

Training Environment Overview

Purpose

This document is intended to provide a description of the Migrant Student Information Exchange (MSIX) Training Environment, the policies for reserving and using the environment, guidance for conducting training, and the available associated training materials. The MSIX Training Environment has been established to provide a forum for continuing hands-on learning for the MSIX application.

The MSIX Training Environment may be reserved by state Migrant Education Program (MEP) officials to support specific in-state training initiatives. Further information is provided in the following sections to describe how to reserve the MSIX Training Environment and how long it can be reserved.

This document also provides general recommendations for conducting the training activities and includes a complete description of the materials available to support MSIX training events. It is anticipated that training event coordinators and/or facilitators will work with members of the MSIX team to identify the materials best suited to meet their training event's goals and objectives.

Environment Description

The MSIX Training Environment is a separate environment from the MSIX Production environment that has been pre-populated with a set of approximately 250 fictitious student records designed to support a series of documented MSIX hands-on training exercises. The environment can be accessed through any Internet connection via the following URL: https://training.msix.ed.gov. A list of available User IDs and Passwords will be provided to those reserving the environment for a training event. To prevent unauthorized access to the environment that potentially could disrupt a training event, the provided User IDs and Passwords will only be available during the reservation period.

The MSIX Training Environment has also been configured to prevent email notification. This change was incorporated to prevent any potential confusion between actual MSIX-generated email notifications and any email notifications used for training purposes.

Policies and Procedures

The following sections provide additional information regarding how to request use of the MSIX Training Environment and guidance on how to structure a training event using that environment.

Requesting the Environment

The MSIX Training Environment can be reserved by any state participating in the MSIX Program. The state should contact the MSIX Help Desk at 866-878-9525 or by email (msixsupport@deloitte.com) to request an MSIX Training Environment reservation. A reservation allows the state to use the environment for up to two consecutive days. The MSIX Team requires three business days between training events to reset the environment for use by another state.

Once a reservation request has been received, a member of the MSIX Team will contact the requestor to confirm the environment's availability and to schedule a brief kick-off call. The purpose of this call will be to discuss the training format, provide more detailed information about the environment, outline the supporting training materials, and to answers any outstanding questions.

Training Event Format

The MSIX Training Environment has been designed to support training events similar to the MSIX Train-the-Trainer Conferences conducted in September through December 2007. The student and user data available in the environment can support training events with up to 40 students. However, class sizes of 20 students or fewer are strongly recommended.

The MSIX Training Environment and supporting materials are designed to be used in an instructor-led, hands-on training format. The training materials consist of a standard MSIX presentation and a series of role-based, hands-on exercises to introduce the training participants to MSIX resources and navigation, and the Primary User, User Administrator, and Region Administrator roles. A demonstration of the Data Administrator role, to be conducted by the instructor, is also provided. It is recommended that the participants take the MSIX Online Training modules before beginning the hands-on exercises. The online training modules can either be identified as pre-requisites prior to attending the training event, or scheduled prior to the hands-on exercises as part of the training event.

A more detailed description of the materials available to support events in the MSIX Training Environment is provided below in the Training Materials section.

Support

In the event that problems occur in the MSIX Training Environment during a training event, contact the MSIX Help Desk at 866-878-9525 or by email at msixsupport@deloitte.com to report the issue. When possible, the Help Desk staff will provide instructions to resolve the issue. In all other situations, the Help Desk staff will contact the appropriate members of the MSIX Team to resolve the issue. To provide the highest possible level of support for MSIX users, resolution of any Production issues reported on MSIX will take precedence over issues reported in the MSIX Training Environment.

Training Materials

A set of materials has been developed and made available to states to support training events conducted in the MSIX Training Environment. These materials, as described below, provide the framework upon which an MSIX training event can be designed. Depending upon the audience and objectives for the training event, only a subset of these materials may be used. Recommendations on how to structure training events to best utilize the available materials will be provided during the Training Environment kick-off conference call.

Presentation

A Microsoft PowerPoint presentation is available connect the various components of the training event and provide an overall structure to the event. Based heavily upon the presentation used at the MSIX Train-the-Trainer Conferences, this presentation includes overview materials for MSIX and the Records Exchange Initiative. It also includes materials describing each of the MSIX User Roles that can be used as an introduction to the associated hands-on exercises or demonstration.

The complete presentation contains materials on the following topics and can be tailored by states to align with the objectives of each conference.

- Introductions and Logistics
- Background of MSIX and the Records Exchange Initiative
- MSIX Overview
- MSIX Primary User Role
- MSIX Data Administrator Role
- MSIX User Administrator Role
- MSIX Region Administrator Role
- MSIX Supporting Materials
- Being an MSIX Champion

Exercises

The MSIX hands-on training exercises are designed to give users an opportunity to use MSIX to perform activities similar to those that will be performed as part of their regular job responsibilities. The exercises are intended to be performed after the user has taken the corresponding MSIX online training module. It is recommended that the participants either complete the MSIX online training modules prior to attending the training event, or that the training event be structured to include time to complete the online training modules before beginning the hands-on exercises.

The MSIX Training Environment contains all the data necessary to complete the hands-on exercises. Due to the close relationship between the training exercises and the data, the MSIX team cannot customize the materials and data to meet special state-specific needs. Each exercise includes instructions to log into MSIX in a specific role. Specific User IDs and Passwords are *not* documented in the training exercises, but will be provided to the Training Facilitator when the training environment is reserved. User IDs and Passwords will be

changed for each state event to prevent unauthorized access to the environment that could potentially disrupt other planned training events.

The hands-on exercises are designed to provide role-specific instruction to users. A complete list of the available exercises, arranged by MSIX role, is provided below.

All Users

The "All Users" hands-on exercises are intended to provide trainees with an overview of MSIX navigation methods and the supporting MSIX resource materials. These exercises are recommended as the starting point for all potential MSIX users, regardless of their eventual anticipated role. They walk the user through all of the resources that are found outside the MSIX application on the MSIX website Sign In page as well as those resources inside the application that are available to every user.

- Exercise 1 – MSIX Website Review

  This exercise leads participants through an overview of the resources available on the MSIX Trainers' Corner and other Sign In page links.

- Exercise 2 – MSIX General Login and Navigation

  This exercise provides login and logout instructions and an overview of MSIX navigation options. It also introduces the available external links, resources found on the Home page, and options for using the My Account page.

Primary User

The Primary User hands-on exercises are designed to provide instruction and examples of common functions performed by Primary Users. Users that will be assigned the Data Administrator and Secondary User roles will also benefit from performing these hands-on exercises.

- **Exercise 1 – Student Search**

  This exercise instructs the user in performing basic and advanced student searches in MSIX. It exercise also introduces the Student Search Results page, provides an opportunity to review the Student Consolidated and Historical views, and how to access the corresponding Student Consolidated and Historical reports.

- **Exercise 2 – Send and Receive Notification**

  This exercise demonstrates the student move notification functionality by walking participants through the process to create and send a notification when a student moves out of the Primary User's jurisdiction.

User Administrator

The User Administrator hands-on exercises are intended for State User Administrators and Regional User Administrators. The exercises provide instruction on creating and modifying MSIX user accounts.

- **Exercise 1 – Create New User Accounts**

  This exercise demonstrates how to create a new MSIX user account. The participant has the opportunity to create a variety of user accounts using the information provided on sample MSIX User Application forms.

- **Exercise 2 – Update Existing User Accounts**

This exercise covers the User Administrator search function. It also includes steps that guide the participant through the process to change an existing MSIX user account.

Region Administrator

The MSIX Region Administrator hands-on exercises are intended to provide instruction on enabling a regional structure within a state and create and modify regions in that structure. These exercises are intended solely for states that will utilize the optional Regional functionality for User Administration, Data Administration, or both.

- **Exercise 1 – Create Regions**

  This exercise demonstrates how to enable the Regional functionality and create new regions within a state.
- **Exercise 2 – Modify Regions**

  This exercise covers the process to view existing regions within a state and modify the districts contained in the regions.

Demonstrations

Three scripted demonstrations have been developed to provide instruction on the MSIX Data Administrator roles. Due to the complexities associated with staging matching data and coordinating the distribution of worklist items for resolution and validation for a full class, the Data Administrator portion of the program is designed as a set of demonstrations to be conducted by the Training Facilitator, not as hands-on exercises. The demonstrations are applicable for District, Regional, and State Data Administrators.

The three scripted demonstrations address the three core Data Administrator functions.

- **Demonstration 1 – Near Match Resolution**

  This demonstration covers how to navigate to the worklist, identify Near Match resolution worklist items, and process those worklist items.
- **Demonstration 2 – User-Initiated Merge**

  This demonstration addresses the process to initiate the merge of similar student records. It includes the steps necessary to validate the merge. The demonstration concludes by viewing the newly merged student records.
- **Demonstration 3 – User-Initiated Split**

  This demonstration covers the process to initiate a split of a student record that has previously been merged in error. The demonstration includes steps to initiate the split, validate the split, and view the resulting separate student records.

It is recommended that class participants take the Data Administrator online training module in addition to watching the Data Administrator demonstrations to give them a modified hands-on experience.

Other Documents

Two other tools have been developed for use during MSIX training events, in addition to the training materials previously addressed. These items provide further opportunities for participants to test their knowledge of MSIX and the available supporting resources.

Pop Quiz

The Pop Quiz contains 10 questions to test the participant's beginning knowledge of MSIX. It is intended to be given at the start of a training event to help determine how much exposure the participants have already had to MSIX and the Records Exchange Initiative.

Treasure Hunt

The Treasure Hunt is activity that requires participants to search through the MSIX website Sign In page and inside the application to locate the available MSIX support resources. This activity is intended to highlight the variety of supporting materials available to MSIX users and the variety of means available to access them. It is also meant as a job aid for locating that various resources that are available.

MSIX Trainers' Corner

In addition to the materials developed specifically to support MSIX training events, a variety of other MSIX resources are also available to MSIX users through the MSIX Trainers' Corner. These materials can also be leveraged in training events as appropriate, based on the goals and objectives of the event. The MSIX Trainers' Corner can be accessed by clicking on the Trainers' Corner link on the MSIX Login page (https://msix.ed.gov). The following items are examples of the materials available in the MSIX Trainers' Corner:

- **Online Training** – Six role-based MSIX training courses
- **User Manual** (MS Word, Adobe PDF, 508 Compliant) – Detailed resource for using MSIX
- **Quick Reference Guide** (MS Word, Adobe PDF) – One-page job aide to summarize the steps for the most commonly used MSIX tasks
- **Frequently Asked Questions** (MS Word, 508 Compliant) – Most typically asked questions in a searchable tool
- **User Administrator Guide** (MS Word, Adobe PDF) – Role-specific manual to support User Administrator tasks
- **User Access Guide** (MS Word, Adobe PDF) – Manual to guide users in requesting and acquiring a user account
- **User Access Form** (MS Word, Adobe PDF) – Sample form that States can use to register users, verify their identification, and confirm the correct level of the user's access
- **MSIX Brochure** (Adobe PDF in English and Spanish) – Concise information to describe MSIX presented in a question-style format
- **User Conference Presentation** – A basic overview of MSIX that was used at various conferences to introduce MSIX
- **MSIX Help Desk** – Phone number and email address for the Help Desk
- **MSIX Change Notes** (MS Word, Adobe PDF) – Descriptions of the enhancements made to MSIX since its initial roll-out in September 2007

Training Facilitation Tips

While there are many logistical details to attend to when delivering training, there are also several other considerations to be aware of as well. Understanding the audience and their needs is particularly important to help them learn most effectively. Adult learners have certain expectations of training experience, so understanding ways to meet their interest is a valuable skill. Additionally, knowing some of the "dos" and "don'ts" when training will help the session to flow more smoothly.

Adult Learning Principles

As learners, the expectations change from child to adult. Children expect to be told exactly what to do and how to react as they learn. Adults abandon this pedantic approach and instead want justification for why they are spending their time and attention in training. Here are just some of what an adult learner is expecting when they walk in the door for training. They want to:
- Know *why* they need to learn something
- Learn *experientially* through scenario-based exercises
- Focus on "*real-world*" problems
- Approach learning as *problem-solving*
- See the topic as having *immediate value*
- *Use* what they have learned soon after training
- Learn at their *own pace*

Conducting the Training Session

Preparation and planning for the training session take considerable time and energy. However, all of that work needs the support of an effectively delivered training session. Here are some of the key areas of focus when deliverying the training content:
- *Communicate Key Points* – Understand the essential elements that are important to the state's or area's MSIX training agenda and elaborate on what they need to know. Review the materials in advance to address the areas of special concern.
- *Encourage Participation* – Use open and close-ended questions as the topic dictates to help the participants think through the learning area. Also, recognize the participants verbal and non-verbal cues that reinforce what they *do* and do *not* understand. It will take more time for some than others to complete the exercises or grasp certain concepts.
- *Address Participant Questions and Objections* – There may be questions during the session that cannot answer. Don't hesitate to contact the MSIX Help Desk during breaks or training exercise session to seek those solutions.
- *Handle Challenging Behaviors* – There is always the possibility of difficult behaviors presenting themselvs. If so, maintain a relaxed posture—don't get flustered. Even in those situations, maintain the self-esteem of the "challenging participant." Seek to listen, clarify, and acknowledge what they present. However, at the same time, deal with it directly, ask the group to deal with it, or ask to discuss it privately.